



Substitute for form 1449A/PTO			Complete if Known	
<b>INFORMATION DISCLOSURE STATEMENT BY APPLICANT</b>  <i>(use as many sheets as necessary)</i>			Application Number	09/929,735
			Filing Date	August 13, 2001
			First Named Inventor	Stephen B. Slutsky
			Art Unit	3625
			Examiner Name	Garg, Yogesh C
Sheet <u>1</u> of <u>1</u>	Attorney Docket Number	60021-375702		

U.S. PATENT DOCUMENTS				
Examiner Initials*	Cite No. <sup>1</sup>	Document Number Number -Kind Code <sup>2</sup> (if known)	Issue Date MM-DD-YYYY	Name of Patentee or Applicant of Cited Document
<u>Y</u>	1	US-6,430,542	08-2002	Moran, William J.
<u>Y</u>	2	US-5,918,217	06-1999	Maggioncalda et al.
<u>Y</u>	3	US-5,819,263	10-1998	Bromley et al.
<u>Y</u>	4	US-6,012,043	01-2000	Albright et al.
	5			
	6			

FOREIGN PATENT DOCUMENTS				
Examiner Initials*	Cite No. <sup>1</sup>	Foreign Patent Document Country Code <sup>3</sup> -Number-Kind Code <sup>3</sup> (if known)	Publication Date MM-DD-YYYY	Name of Patentee or Applicant of Cited Document

OTHER PRIOR ART - NON PATENT LITERATURE DOCUMENTS				
Examiner Initials	Cite No. <sup>1</sup>	Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published		
<u>Y</u>	1	"Personal financial software", The CPA Journal, New York, September 1999, Vol.69, Iss.9; pg 40, 7 pgs, Proquest, describes numbers of software packages on the market for providing automated coaching for a financial modeling.		
	2			

Examiner Signature	<i>GARG</i>	Date Considered	<i>6/26/05</i>
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\*EXAMINER: Initial if reference considered, whether or not citation is in conformance with MPEP 609. Draw line through citation if not in conformance and not considered. Include copy of this form with next communication to applicant.

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<sup>6</sup>Applicant is to place a check mark here if English language Translation is attached.